**Over Issuance Report Guidance**

To be in compliance with Illinois WIC Policy Admin. 2.4, the local agency WIC Coordinator and/or designated staff must conduct the following quality assurance:

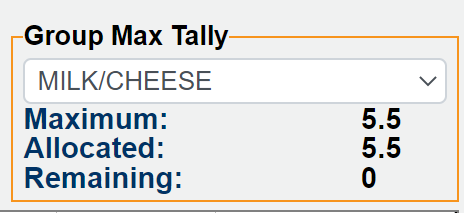
1. Monitor IWIC *Benefit Over Issuance* report (recommend at least weekly).
   1. To access the report for your agency, go to: Admin>Reports>eWIC Reports>Benefit Over Issuance
   2. Due to benefit base days, this report must be ran and reviewed for last month and current month.
2. Document findings on the attached over issuance tracking log.
   1. Investigate each *Participant ID* listed on the report by reviewing the *Benefits Inquiry* screen for the benefit start date that appears on the report.
      1. Review the “Redeemed” and “Remain” column on the *benefits inquiry* screen to ensure benefits were issued correctly. Use the *staff resources* and q*uestions to ask staff* listed below to determine if a true overage occurred.
         1. Note: Appearance on this report does not mean a true over-issuance occurred. Benefits could have been issued correctly, over-issued, or even under-issued. Each participant ID must be reviewed to determine.
   2. Choose an “agency resolution” from the dropdown menu: 1) no overage noted; 2) over found and corrected before benefits redeemed; or 3) overage found and unable to be correct.
   3. Choose an “agency action step” from the dropdown menu: 1) N/A; 2) HOH educated on benefits error. Updated FSL offered to family. Staff educated on proper void/reissue process; or 3) Staff re-educated on void/reissue process.
   4. Document each participant ID once on the tracking log.
3. Return tracking log to your RNC monthly.

Staff Resources:

<https://www.springfieldul.org/chtc/resources>

* IWIC Web-based Training Module 9: Formula Change
* *IWIC Void and Reissue* (5.2021)document
* *Illinois WIC Food Package Tables*
* *Healthy Options at WIC: Women and Children CPA Desktop Reference* (3.2020)
* *IWIC: Appointments* (9.2021) document
* *NPS Breastfeeding*

Are Staff:

* Following the *IWIC Void and Reissue* document?
* Using the formula calculator?
  + Formula calculator must be used when voiding and reissuing different forms of formula (powder to concentrate, concentrate to RTF) or contract to medically prescribed and visa versa.
  + Note – Changing from one powder contract formula to another, due to similar can size/reconstituted volume (i.e. Gentlease powder to Enfamil powder), staff should make an equal change.
* Confirming the “Group Max Tally” remaining balance is always zero?
  + Staff should reference the *Food Package Tables*, *Healthy Options at WIC: Women and Children* CPA Desktop Reference and the Group Max Tally box in IWIC to ensure proper issuance occurs.
* Taking time to read the IWIC pop-up boxes on the *Issue Benefits* screen?
* Reviewing the *Benefits Inquiry* screen and *Family Shopping List* to ensure food packages and benefits were issued correctly?

**(LA Name) SFY23 Over Issuance Report Tracking Log**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Click or tap to enter a date. | Report Month: | | | Name of staff performing audit: |  |
| **HH ID #** | **Pt ID #** | **Staff Name(s)** | **Benefit Start Date** | **Agency Resolution**  *(Select from dropdown)* | **Agency Action Steps**  *(Select from dropdown)* |
| 1234568 | 301010102 | Suzie Sunshine | 10/5/22 | Overage found and partially redeemed. | HOH educated on benefit error. Updated FSL offered to family. Staff educated on proper void/reissue process. |
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| **HH ID #** | **Pt ID #** | **Staff Name(s)** | **Benefit Start Date** | **Agency Resolution**  *(Select from dropdown)* | **Agency Action Steps**  *(Select from dropdown)* |
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